

Tender specifications for subcontracting external expertise¹

EU SOCIAL PARTNERS' PROJECT ON EMPLOYEE TRAINING

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Contents

1. BACKGROUND	2
1.1 Introduction	2
1.2 Project description.....	2
1.3 Objective	3
1.4 Method	3
1.5 Activities	4
1.6 Organisation.....	5
1.7 Description of project partnership	6
2. PURPOSE OF THE TENDER.....	6
3. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR	6
4. EXPERTISE AND EXPERIENCE REQUIRED	8
5. TIME SCHEDULE AND REPORTING	8
6. PAYMENT	9
7. PRICE	9
8. FORM, STRUCTURE AND CONTENT OF THE TENDER.....	9
9. SELECTION CRITERIA.....	10
10. AWARD CRITERIA	10
11. CONTENT AND SELECTION OF THE BIDS	10

¹ Under reserve of acceptance of the project by the European Commission

1. BACKGROUND

1.1 Introduction

EU cross-sectoral social partners (BusinessEurope, CEEP, UEAPME and ETUC) have undertaken as part of the upcoming Integrated Projects of the EU social dialogue 2016-2018 to conduct a project on employee training.

This project will be supported by funding from the European Commission. An official decision by the European Commission on the allocation of funds is expected in November 2016. Once this is confirmed the project activities and subcontracted experts contract would commence in December 2016.

In the framework of this call, EU cross-sectoral social partners express their intention to select a subcontractor to carry out the 24-month activity entitled:

“Promoting social partnership in employee training”

The tender specifications included in this document detail the background, tasks, price, and selection criteria and procedures regarding the subcontractor.

Possible bidders need to be aware that awarding of the subcontracting work is dependent on a Commission’s positive decision to grant financial support to this project. Moreover, changes to the present call for tender may be required, taking into account possible remarks from the European Commission.

1.2 Project description

Given the growing importance of knowledge, skills and competencies in the economy and in society, it is important to ensure that training policies are efficient. Around 66% of enterprises already invest in some form of training for their employees and it is important to look at ways to build on the idea that training is a productive investment for enterprises and workers. At the same time, employees must be incentivised to update and upgrade their skills, including low-skilled workers.

Employers and trade unions are best placed to set up efficient strategies on skills and qualifications development through social dialogue and collective bargaining, in line with national, sectoral or enterprise practices. The role of social partners is essential to design training content to underpin productivity gains and employee career development, as well as ensuring adequate access and availability of training opportunities on a cost-sharing basis. This project will focus on fostering the social partnership approach for skills development at all levels, with a particular focus on the enterprise level, taking into account the priority actions that were set out in the 2002 Framework of Actions on life-long learning.

The project will look into different ways in which employee training is organised and possibly regulated in 12 target countries², including identifying barriers which may discourage enterprises from offering training (during or outside working hours). The aim will also be to show that training should be understood broadly (formal courses, but also on-the job training, mentoring, knowledge, skills and competence development for innovation, transversal skills, etc.). The project could also try to identify principles on how to ensure the quality (in terms of learning outcomes and relevance), effectiveness and

² To be finalised by the European social partners in due time before the first meeting of the project steering committee

efficiency of training investment for employers and employees on the basis of good practice (and perhaps also bad practice). As part of this, employee motivation, willingness, and awareness of training provision and benefits will be looked at. The project could also try to gather information and examples on the extent of the recognition of non-formal and informal learning.

1.3 Objective

To provide a comprehensive overview of the way in which employee training is organised and possibly regulated in twelve Member States and to explore how to foster the social partnership approach for skills development at all levels, with a particular focus on the enterprise level. The key objective is to improve skills development in a way that is mutually beneficial for enterprises and workers.

1.4 Method

1. First phase: background research and preparation of country reports

The first stage of the project would involve desk research into how employee training is organised and possibly regulated/in the 12 target countries as well as the different roles played by social partners at national, sectoral and enterprise levels, taking into account the description and the objectives of the project.

The desk research could be supported by telephone interviews based on the recommendation of national social partners. Consideration will be given to addressing a short questionnaire³ to social partners.

Based on this input, the diversity of practice at national level will be documented, including a well-balanced mix of practices at cross-industry, sectoral and enterprise level. The link with possible regulations in this area will also be analysed.

There will be a travel fund available to allow the subcontracted expert to meet with relevant social partners organisations to conduct interviews and gather information, where appropriate.

The subcontracted expert, in close coordination with the steering committee, will then prepare national country reports for the 12 target countries. These reports will be used as a basis for discussions at a series of cluster seminars.

What is important is to get the views of the social partners on the system and their satisfaction level.

2. Second phase: cluster seminars

The second stage will involve a series of three cluster seminars that would be organised with the target countries. These seminars would group together 4 countries at a time. The seminars would focus on existing examples of (good) practices. The general format of the seminars would be developed by the steering committee and then tailored in consultation with the countries concerned.

The cluster seminars will enable the social partners from the target countries to discuss the country reports and to identify challenges and solutions which are relevant to their national context. The subcontractor and/or a member of his/her team, will attend the cluster

³ Questions to be developed at the first meeting of the steering committee

seminars and have the possibility to go one day in advance of the seminars for meetings with relevant stakeholders in preparation for cluster seminars discussions on the draft country reports. This is to be determined in consultation with the project organisers. Organising company visits and/or inviting guest speakers from other countries will be considered on demand by the social partners in the target countries.

3. Third phase: final conference and final report

Based on the outcome of the seminars, the subcontractor, in close collaboration with the steering committee, will prepare a final report that will be presented at a final conference in Brussels (provisionally foreseen for September 2018). This conference will bring together the project partners and their relevant national affiliates and stakeholders.

Building on this project, the objective will be to foster social dialogue around employee training, taking into account the diversity of industrial relations practices at national level.

1.5 Activities

A short description of the main features of the project follows:

Steering committee meeting #1

- The steering committee would be composed of representatives from the secretariats of the EU cross-sectoral social partners and the subcontractor.
- The first meeting would be in January 2017. During this meeting, the steering committee will agree the details for the preparatory phase of the project and determine the dates of the cluster seminars and the final conference. The target countries will be identified by the European social partners in due time before the first steering meeting. The steering committee will also discuss a provisional structure for the cluster seminars.
- The project organisers, with input from the subcontractor, will be responsible for preparing a draft agenda for each meeting of the steering committee. The subcontractor will prepare a summary of conclusions in coordination with the steering committee.

Research and preparation of country reports

The subcontractor will:

- Conduct desk research, including with the support of interviews/questionnaires, to map out the different systems of employee training, as well as the different roles played by social partners at national, regional, sectoral and enterprise levels in the selected countries, and where appropriate, the role of public employment services.
- Collect examples of good and less successful practices. The aim would be to include up to 5 practices from each country, including at least two from the enterprise level.
- Prepare the country reports (up to 10 pages), including descriptive elements related to the desk research and mapping, and the examples of good/bad practices.
- Country reports will need to be submitted at least 4 weeks in advance of the cluster seminar in which the respective countries are participating to allow for translation.

Steering committee meeting #2

- A second meeting of the steering committee will take place in July 2017 to take stock of the project to date, including a review of the first cluster seminar to determine if the format for the seminars should be adapted, and to plan the remaining seminars.

Three cluster seminars

- 3 two-day seminars.
- Seminars would have up to 50 participants (20 trade unions/20 employers/10 secretariats).
- Date: April 2017 – April 2018.
- The subcontractor and/or a member of his/her team will also attend the cluster seminars, present an overview of research findings at the seminar and provide moderation.
- For each cluster seminar the subcontractor will prepare a summary of discussions held in coordination with the steering committee.

Steering committee meeting #3

- A committee meeting will take place in May 2018, to discuss the outcomes of the 3 cluster seminars, the draft final report, and to prepare the final conference - foreseen for September 2018.

Final one-day conference in Brussels

- +/- 120 participants from target and other EU countries.
- Date: September 2018.
- Languages: 5 languages will be available for interpretation (EN + 4 others TBC).

Provisional Calendar of activities	
2016	
September	Launch of Call for Tender
November	Selection of subcontracted expert
December	Kick-off Steering Committee Meeting #1 with subcontracted expert
2017	
January - April	Research for preparation of country reports conducted by subcontracted experts
April – April 2018	Cluster seminars in target countries
July	Steering Committee Meeting #2 with subcontracted expert
2018	
May	Steering Committee Meeting #3 with subcontracted expert
September	European social partners' joint conference

1.6 Organisation

For the implementation of this project, an expert will be contracted for the following work:

- He/she will make as part of the bid an initial proposal on how to conduct the initial research (main sources and data), and prepare a short concept note regarding the methodology for the preparation of the country reports. The steering committee will

discuss both aspects with a view to agreeing rapidly at the beginning of the project on the structure of the country reports.

- He/she is responsible for preparing the 12 draft country reports, which will be the main deliverable from the first phase of the project. Following the respective cluster seminars and the comments made at these events he/she will update the individual country reports. He/she will also prepare a final report for presentation at a concluding conference in Brussels. This report will be prepared in coordination with the steering committee. A first draft of the report should be submitted in time for discussion at the 3rd Steering Committee meeting to allow for corrections, validation approval, with the final report being finalised 6 weeks before the date of the final conference to allow for translation, and layout and printing. The final report should be +/- 50 pages. In parallel, the European social partners will consider preparing a video, including a supporting role by the subcontractor.
- In constant liaison with BusinessEurope, he/she will work under the control and supervision of a steering committee.

Please refer to the subcontractor terms of reference (Section 3 below) for a more detailed description of the experts' tasks and deliverables.

1.7 Description of project partnership

Management of this project is shared by the ETUC and BusinessEurope (on behalf of the EU employer organisations). BusinessEurope is responsible for the management of subcontracted expertise on behalf of the cross-sectoral social partners.

The partners will provide expertise for the project components, steering committee meetings and the EU-level conference in Brussels.

2. PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European cross-sectoral social partner organisations entitled "*Promoting social partnership in employee training*".

In order to ensure a large visibility for this tender, BusinessEurope, CEEP, UEAPME and the ETUC will publish the tender specifications on their websites; they will each keep the tender online for one month.

3. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

The subcontractor should provide the following services for the applicant organisations:

For the kick-off steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to propose a methodology for the preparatory phase (mapping the different systems of employee training, as well as the different roles played by the social partners at national, sectoral and enterprise level), coherent with the description of the project and its aims (above);
- to present a preliminary draft of the structure of the country reports (1-2 pages).

For the background research and preparation of the country reports, the tasks to be performed by the subcontractor are the following:

- Desk research on the employee training systems in 12 target countries including the role of social partners at national, sectoral and enterprise level;
- Collect examples of best practices (and less successful practices, if any). The reports should aim to include up to 5 practices from each country, including at least two from the enterprise level. The total length of the reports should be up to 10 pages;
- The country reports are to be considered a work in progress as they may be revised following the discussions at the cluster seminars;
- The subcontractor will have at his/her disposal the possibility to undertake funded visits to the 12 target countries to organise face-to-face meetings with social partners to complement desk research, if and as required. These visits are part of the 50 days allocated to the subcontractor for the preparatory phase of the project, including proposing the methodology, initial desk research, conducting interviews and face-to-face meetings with national stakeholders, drafting of 12 country reports (+/- 10pages);
- A bibliography of literature and technical documents used and reviewed should be appended to the country reports.

For the second steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to present the results of the preparatory phase and key themes identified across the country reports;
- To give his/her views on the content and outcome of the first cluster seminar and to advise on the issues that could be addressed in the remaining seminars taking into account the content of the country reports.

For each of the three cluster seminars the tasks to be performed by the subcontractor are the following:

- to present the country reports, and moderate the seminar;
- to prepare a short written summary of the discussions held at the seminar;

For the third steering committee meeting, the tasks to be performed by the subcontractor are the following:

- To evaluate the series of cluster seminars and to advise on final adaptations to the country reports;
- to present the draft final report, and a proposal on key social partner practices to be highlighted during the final conference.

For the final conference the subcontractor will participate in the conference to present the final report. The subcontractor will also moderate the conference.

For the final report, for which the subcontractor will have 20 days to prepare, the tasks of the subcontractor are the following:

- to prepare the draft report (+/- 50 pages), which should make use of the findings of the country reports and discussions at the cluster seminars to draw together some conclusions and recommendations on how to improve the different employee training systems and the engagement of social partners in employee training;
- to ensure that the final report is user friendly and in line with the overall objective of the project.

Travel Fund

The subcontractor and his/her team will have the possibility to travel to the target countries for background interviews with relevant stakeholders. This fund will allow travel for 3 persons for up to 1 day at a time for up to 10 country visits. Whether or not all countries would need to be visited would be at the discretion of the subcontractor.

4. EXPERTISE AND EXPERIENCE REQUIRED

Subcontractor

Sound experience is required in the following areas:

- Good knowledge and understanding of the education and training systems and practices, in particular for continuous training including workplace training, at European, national, regional and sectoral levels;
- Demonstrated experience and expertise in developing comparative analyses on labour markets / skills development issues (drawing in this case on the national information which will be gathered through the project);
- Experience in working with social partners at European and national levels;
- Successful track record in delivering research-based European level projects.

Following skills are also required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national levels;
- Proven research skills, including identifying relevant stakeholders beyond the social partners, and conducting interviews;
- High proficiency in English: ability to draft documents and make presentations in English. Knowledge of other languages is a plus;
- Ability to work within specified deadlines and to respect budgetary limits.

The bidder must specify in his/her application whether he/she will work alone or with a team and how many people are in the team. He/she must also send their CV as well as those of any team members.

5. TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01/12/2016 or 01/01/2017 to 30/11/2018.

The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

Travel and subsistence costs as part of this project will be reimbursed to the subcontractor, in accordance with BusinessEurope internal rules on project management.

6. PAYMENT

The total maximum budget available for expertise is as follows:

Contract with BusinessEurope	
<ul style="list-style-type: none">➤ Steering Committee meeting # 1➤ Preparatory phase, background research and desk research➤ Interviews and documentary analysis➤ Preparation of 12 country reports➤ First cluster seminar➤ Steering Committee meeting # 2➤ Preparation of 12 country reports➤ Cluster seminars 2 and 3➤ Steering Committee meeting # 3➤ Preparation final report➤ Final conference	
Total budget for the Expertise	€
	49,500
TOTAL € 49,500	

In accordance with the above table, the subcontractor will enter into a contract with BusinessEurope for a total of € 49,500 (**all taxes included**).

Upon invoice the subcontractor will receive an advance, interim and final payment.

7. PRICE

Contract with BusinessEurope: € 49,500

TOTAL: € 49,500

8. FORM, STRUCTURE AND CONTENT OF THE TENDER

Tenders must be written in English. They must be signed by the tenderer or his duly authorised representative and be perfectly legible so that there can be no doubt as to words and figures. Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

All tenders must include at least two sections:

- i) Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

- Specific information covering the technical and professional capacity, as required, in particular:
 - Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
 - Detailed curriculum vitae of key coordinator and/or possible other team members;
 - A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.
 - Specific information concerning the proposed methodology for delivering the tasks listed in part 3.
- ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

The maximum amount available for this contract is EUR 49,500 (all taxes included).

Prices shall be fixed and not subject to revision during the performance of the contract.

9. SELECTION CRITERIA

The offers will be examined against the following criteria:

- Verifiable expertise, experience and skills, as required and described above;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Initial proposal on how to conduct the initial research (main sources and data), and short concept note regarding the methodology for the preparation of the country reports;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field education and training, in particular employee training, taking into account employers and workers' needs.

10. AWARD CRITERIA

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

11. CONTENT AND SELECTION OF THE BIDS

Offers must be received within 40 days of the date of publication of this call for tender by BusinessEurope, i.e. by 23 November 2016. Offers must be sent to BusinessEurope (see contact address below).

To ensure confidentiality, **bidders must submit their offer in a sealed envelope and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "Tender – not to be opened by the Mail**

Department” (Appel d’offre – à ne pas ouvrir par le service du courrier). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising four representatives of the European cross-sectoral social partners (BusinessEurope, CEEP, UEAPME and ETUC). One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to:

<p>BusinessEurope Maxime Cerutti Director, Social Affairs Department Avenue de Cortenbergh 168 B – 1000 Brussels Belgium</p>

For requests sent by registered mail, the postmark will serve as proof of the date of dispatch.
